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Welcome to a new edition of the TRENDS Med-MENA Nexus Monthly Report, the analytical platform from TRENDS Research & Advisory dedicated to unpacking how Italy and Southern Europe are reshaping their strategic engagement with the Mediterranean, the Gulf, and beyond.

August 2026 showed how far the relationship between Europe and the Gulf now runs in both directions. Gulf states still draw heavily on European technology, expertise and investment, but companies and platforms built through their own diversification strategies are now entering European markets. Meanwhile, the Iran war continues to disrupt trade between the two regions, pushing companies to build more resilient supply chains and alternative transport corridors.

This month's report looks at three of these dynamics. The first is logistics: continued disruption to maritime trade is reshaping Gulf supply chains and accelerating the development of overland corridors between Europe and the GCC, along with new investment in rail, warehousing and regional manufacturing. The second is space, where Emirati partnerships with France and Spain show GCC companies acting as technology providers, investors and industrial partners in Europe. The third is entertainment, where developments in France show companies and platforms created under Vision 2030 starting to establish a presence in European markets.

1. Redrawing the Gulf Supply Chain: How Trade Disruption Is Changing Regional Logistics

More than six months into the Iran war, the disruption of shipping through the Strait of Hormuz is changing how companies organise supply chains across the Gulf. The first response was improvised: cargo was diverted to ports outside the Strait and moved on by truck. That response is now spreading to warehousing, rail links, inland logistics hubs and decisions over where goods are manufactured or assembled. In other words, companies are building redundancy into how goods move and are produced across the region.

According to the World Trade Organization, global shipping lines have responded since March by developing multimodal services that combine sea transport with road and rail links, regional gateways and land bridges to keep serving Gulf markets (Figure 1).[1] Sea freight will remain dominant for large volumes, but the crisis has raised the commercial value of having more than one route available.

The ports on the eastern coasts of the UAE and Oman were the first to feel the change. At Khor Fakkan, daily truck movements rose from around 100 before the war to about 8,500 by early July, while weekly container throughput went from around 8,000 to 65,000 TEU. Gulftainer hired more than 900 additional staff in the first two weeks of March and committed $2 billion to port capacity, logistics parks and shipping services. It plans to lift the terminal's annual capacity from 3.5 million to 5 million TEU within three months, and to more than 10 million under a three-year masterplan. "Our aim is not to capture 100 percent of the market, but to provide certainty and predictability," said Gulftainer's chief executive, Farid Belbouab.[2] In July, DP World added 700 trucks to its road freight network across the GCC, covering first-, middle- and last-mile needs for both containerised and non-containerised cargo.[3]

1. World Trade Organization, "Strait of Hormuz and global trade," https://www.wto.org/english/res_e/statis_e/hormuz_global_trade_e.htm

2. "Gulftainer accelerates expansion of Sharjah's Khor Fakkan port," AGBI, July 2026, 8, https://www.agbi.com/logistics/2026/07/gulftainer-accelerates-expansion-of-sharjahs-khor-fakkan-port/

3. Aarti Nagraj, "DP World buys 700 lorries to boost Gulf road freight network," The National, July 2026, 9, https://www.thenationalnews.com/business/2026/07/09/dp-world-buys-700-lorries-to-boost-gulf-road-freight-network/

Figure 1 – Selected land trade routes from the Middle East



Sources: The Economist, September 2026, 8 (https://www.economist.com/middle-east-and-africa/2026/09/08/as-the-iran-war-menaces-shipping-land-routes-are-making-a-comeback)

Land borders tell a similar story. Loaded trucks passing through Dubai's Hatta Customs Crossing reached 108,811 between January and June, up 160% on the same period in 2025, while the value of trade through the crossing rose 175% to Dh37.08 billion.[4]

Saudi-based Flow Progressive Logistics expanded its fleet from around 340 trailers before the conflict to more than 500 by April.[5] On the Saudi-Omani border, trade through Ramlet Khelah nearly tripled to $830 million within a month of the war,[6] using the road across the Empty Quarter that gave the two countries their first direct land link when it opened in December 2021. In August, Oman's Arkan Logistics and Saudi Arabia's SPARK Logistics agreed to formalise the route as a "Secure Green Land Corridor."[7]

Some of these routes now reach Europe. In May, Rhenus opened a corridor linking Europe and Türkiye with Jordan and the GCC.[8] More than 190,000 kilograms of cargo moved through it in the first month, including oil and gas equipment shipped from France to the UAE in 18 days. In July, Hendrick Logistics Ireland trucked temperature-controlled cargo from Ireland to the UAE in 20 days under the TIR system, against more than 70 days by sea. The company presented the trip as a test of whether a direct Europe-to-GCC road corridor could handle refrigerated goods.[9] By September, Militzer & Münch had completed its first shipment from Berlin to Dubai: 19 tonnes of industrial goods on three trucks, covering around 6,000 kilometres in 14–16 days, with the cargo transferred between vehicles at the Turkish-Syrian border because of restrictions on directtransit.[10]

Aramex, which has completed more than 100 journeys between Europe and Dubai, estimates that sea

4. Nivetha Dayanand, "Dubai-Hatta trade jumps 175% to Dh37.08 billion in six months," Gulf News, September 2026, 9, https://gulfnews.com/business/markets/dubai-hatta-trade-jumps-175-to-dh3708-billion-in-six-months-1.500668090

5. "Saudi logistics reforms speed up trucking across GCC," AGBI, April 2026, https://www.agbi.com/analysis/logistics/2026/04/saudi-logistics-reforms-speed-up-trucking-across-gcc/

6. "Conflict pushes Omani-Saudi border trade to record levels," AGBI, May 2026, https://www.agbi.com/analysis/trade/2026/05/conflict-pushes-omani-saudi-border-trade-to-record-levels/

7. "Oman-Saudi 'green corridor' to speed up cross-border freight," Muscat Daily, August 2026, 16, https://www.muscatdaily.com/2026/08/16/oman-saudi-green-corridor-to-speed-up-cross-border-freight/

8. "Rhenus activates alternative Europe–Middle East land corridor to ensure reliable supply chains amid regional disruption," Rhenus Group, May 2026, 20, https://www.rhenus.group/nl/en/news-media/rhenus-activates-alternative-europe-middle-east-land-corridor-to-ensure-reliable-supply-chains-amid-regional-disruption/

9. "Stay cool: TIR system gets baby food from Ireland to the UAE in no time," International Road Transport Union (IRU), Press release, July 2026, 15, https://www.iru.org/news-resources/newsroom/stay-cool-tir-system-gets-baby-food-ireland-uae-no-time

10. Andreas Haug, "Through the Levant to Dubai," International Transport Journal (ITJ), no. 13, 2026, https://fliphtml5.com/bwrte/ITJ_13_2026_EN/16/

shipments from Europe can currently take 60–80 days, compared with around 30 before the conflict and roughly two weeks by road.[11] Trucking costs more, but for spare parts, industrial components, perishables and other time-sensitive cargo, delay has become the more expensive risk.

The more lasting change is where these diversions meet permanent infrastructure. By September, Etihad Rail Freight and AD Ports Group launched a direct rail service between Fujairah Terminals and the Industrial City of Abu Dhabi (ICAD).[12] Containers arriving on the Gulf of Oman coast can now travel about 200 kilometres by rail to ICAD, where customs clearance, inspections and release take place next to warehouses and factories. ICAD also has its own UN location code, "AECAD", so shipping lines and forwarders can book it directly as a destination. Port, rail, customs and Abu Dhabi's industrial base are becoming parts of a single chain. Other rail links could extend this network further, although they are at very different stages (Table 1). The most advanced, the 238-kilometre Hafeet Rail line between Oman's Sohar Port and the Etihad Rail network, was around 40% complete in June, while the Saudi Land Bridge between Jeddah and Dammam is still in the design phase.

Table 1 – Status of selected Middle East rail infrastructure projects

PROJECT	ABOUT	CURRENT STATUS
Hafeet Rail	238 km cross-border railway linking Oman's Sohar Port to the UAE's Etihad Rail network, the first modern cross-border rail link in the Gulf. Joint venture between Etihad Rail, Oman Rail and Mubadala; $3 billion investment.	**UNDER CONSTRUCTION** 40% complete. No official completion date announced.
Saudi Land Bridge	950 km+ railway linking Jeddah Islamic Port on the Red Sea to Riyadh and Dammam on the Gulf, with extensions to King Abdullah Port, Yanbu and Jubail.	**DESIGN PHASE; PRE-CONSTRUCTION** Completion targeted before 2034. Construction tenders expected mid-2026.
Hijaz Rail	Revival of the 1,750 km Ottoman-era Hejaz Railway, originally connecting Istanbul to Medina via Damascus and Amman. The Jordanian segment is operational; the Syrian segment is dormant.	**REVIVAL UNDERWAY** Trilateral MoU signed on April 7, 2026 in Amman by the transport ministers of Syria, Jordan and Türkiye. Amman–Damascus passenger service targeted by end-2026.

Sources: Adapted from Atlantic Council, Table 5, data as of June 2026 (https://www.atlanticcouncil.org/in-depth-research-reports/report/a-network-of-corridors-is-the-only-reliable-hedge-against-middle-east-chokepoint-disruptions/#status)

Warehousing comes next. Holding stock closer to Gulf consumers and industrial centres reduces exposure to delays along external routes. According to AGBI, Aramex operates around 500,000 square metres of owned warehouse space and plans to reach 1.2 million, with new capacity in Dubai, Riyadh, Dammam and Egypt; around 200,000 square metres should be added over the coming year.[13]

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11. "Europe-to-Gulf trucking gathers pace for Aramex," AGBI, September 2026, https://www.agbi.com/logistics/2026/09/trucking-from-europe-to-the-gulf-gains-traction-for-aramex/

12. "Etihad Rail and AD Ports Group Launch Integrated Rail Service, Connecting Fujairah Terminals with Abu Dhabi's Industrial Heartland," AD Ports Group, September 2026, 20, https://www.adportsgroup.com/en/news-and-media/2026/09/20/etihad-rail-and-ad-ports-group-launch-integrated-rail-service

13. "Europe-to-Gulf trucking gathers pace for Aramex," AGBI, September 2026, https://www.agbi.com/logistics/2026/09/trucking-from-europe-to-the-gulf-gains-traction-for-aramex/

Production may follow. AGBI also reports that companies which previously manufactured in Asia or Europe are considering local or regional assembly to shorten supply chains, with fast-moving consumer goods producers among those exploring the option.[14] For Gulf governments, this fits existing plans to expand domestic manufacturing, industrial zones and logistics capacity.

The limits are real. Road freight cannot match the volumes or economics of shipping, and the surge in overland traffic has exposed shortages of trucks and drivers, while customs depots, weigh stations, rest stops and warehouses have struggled to cope.[15] Border procedures matter too. Trade from Saudi Arabia into the UAE through the Al Batha crossing has picked up since the war began, but trucks have waited anywhere from a few hours to several days to cross, a reminder that limited customs harmonisation can erode the efficiency of regional corridors.[16] Routes to Europe through Türkiye, Syria and Jordan depend in turn on stability and coordination across several jurisdictions.

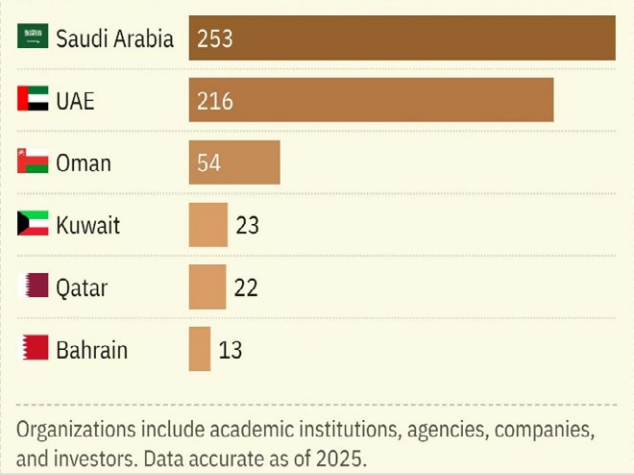
Some emergency routes will lose traffic once shipping through Hormuz returns to normal. What is more likely to last is the infrastructure built during the crisis: ports outside the Strait linked to inland industrial zones, overland corridors to neighbouring regions and Europe, larger inventories closer to consumers, and more assembly within the region. For Gulf companies, resilience now means having several alternatives ready before the next disruption, not simply replacing one route with another.

2. When Gulf Space Technology Comes to Europe

For years, space cooperation between Europe and the Gulf followed a familiar pattern: GCC states invested heavily in satellite communications, Earth observation and manufacturing, and European companies supplied much of the technology. Since August, that pattern has started to change. Gulf companies are now selling space services to European governments, investing in European projects and deploying their own technology in Europe.

Saudi Arabia counts the largest number of space-sector organisations in the GCC (Figure 2), but the UAE has gone furthest in turning its sector into a commercial industry. It has moved beyond state-led exploration into satellite manufacturing, Earth observation, secure communications and geospatial intelligence, and some of these capabilities are now mature enough to serve European customers.

Figure 2 – Number of space-sector organisations in GCC countries (2025)



Sources: Semafor, August 2026, 21 (https://www.semafor.com/article/08/21/2026/uaes-space-industry-expands-with-more-private-satellites). Organisations include academic institutions, agencies, companies and investors.

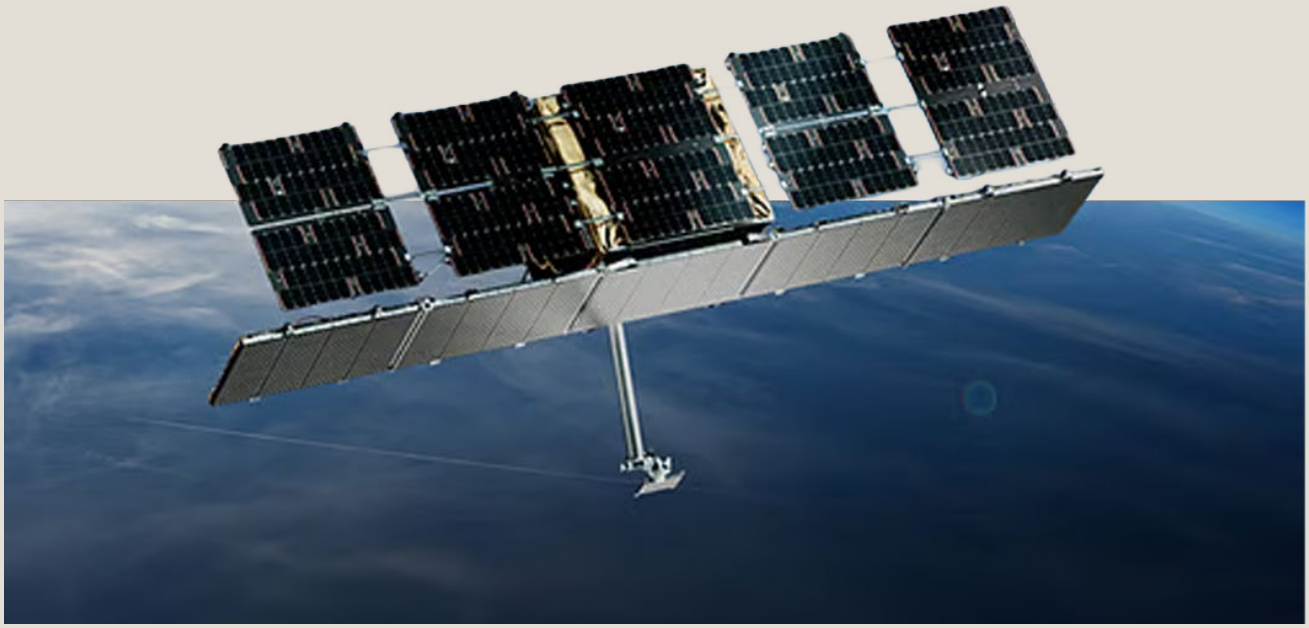
14. "Europe-to-Gulf trucking," AGBI, September 2026.

15. Francesco Salesio Schiavi, "As Maritime Trade Struggles, Trucking Is Transforming the Middle East," Bourse & Bazaar Foundation, August 2026, 27, https://www.bourseandbazaar-substack.org/p/as-maritime-trade-struggles-trucking

16. Matthew Martin and Kelsey Warner, "Saudi-UAE border trade slows amid tensions," Semafor, July 2026, 9, https://www.semafor.com/article/07/09/2026/saudi-uae-border-trade-slows-amid-tensions

On August 6, France's National Centre for Space Studies (CNES) secured dedicated capacity on Orbitworks' Altair constellation under a multi-year arrangement to support French sovereign capabilities.[17] Altair was conceived as ten AI-enabled Earth-observation satellites owned, manufactured and integrated by Orbitworks in Abu Dhabi. The first was shipped to Los Angeles in August ahead of an October launch, with the other nine due over the following year. The deal is one of the first cases of a European national space agency becoming a customer of a constellation built in the Middle East.

A month later, the partnership grew considerably. At the International Space Summit in Paris, UAE-based Marlan Space and Loft Orbital announced a $1 billion investment in France to develop Altair-Next Gen.[18] The programme expands the constellation from ten to an initial 50 satellites carrying radar, optical and



other sensors, which will use onboard AI to process observations in orbit and send results to users faster. Planned customers include the French, European and Emirati governments, as well as other sovereign and commercial users.

What makes Altair-Next Gen relevant for Europe is its industrial set-up. The first satellites are being built and integrated in Abu Dhabi; France's Mistral AI is providing onboard models that will let operators task the satellites in natural language; and the investment announced in Paris will fund infrastructure and capabilities in France. Capital, manufacturing, software and government demand are split between the UAE and France. Loft Orbital's chief executive, Pierre-Damien Vaujour, pitched the constellation as infrastructure for partners "building agentic AI workflows in space."[19]

17. Dominic Dudley, "UAE's space industry expands with more private satellites," Semafor, August 2026, 21, https://www.semafor.com/article/08/21/2026/uaes-space-industry-expands-with-more-private-satellites

18. Darius Popa, "Loft Orbital and Marlan Space plan $1bn AI satellite fleet with Mistral," The Next Web, September 2026, 11, https://thenextweb.com/news/loft-orbital-marlan-space-1bn-ai-satellites-mistral

19. Darius Popa, "Loft Orbital and Marlan Space plan $1bn AI satellite fleet with Mistral," The Next Web, September 2026, 11, https://thenextweb.com/news/loft-orbital-marlan-space-1bn-ai-satellites-mistral

Emirati technology is also being used operationally in Europe. Recently, Space42's Mira Aerospace and Telespazio Ibérica began a wildfire-monitoring mission in Spain with the UAE company's ApusNeo18 High Altitude Platform System.[20] On its first flight from Fuerteventura, the platform stayed airborne for 29 hours, reached about 16,000 feet and transmitted live high-resolution imagery from electro-optical and infrared sensors, setting two European records for high-altitude platforms in the process. Further flights, extending towards Gran Canaria, are planned for October. Telespazio Ibérica is part of Leonardo Space, which also links the programme to the Italian space industry.

Here cooperation goes beyond investment and procurement: Emirati-developed technology is operating within a European civil-protection system, alongside a European partner. The need is real. By mid-August, more than 265,000 hectares had burned in Spain this year. Flying below satellites, high-altitude platforms can keep a given area under persistent observation, supplementing data from satellites, aircraft and ground teams, which is useful for wildfire response, infrastructure monitoring and other time-sensitive tasks. For Telespazio Ibérica's chief executive, Carlos Fernández de la Peña, the technology is now moving "beyond testing towards operationaluse."[21]

On August 12, Space42 and Leonardo DRS signed an MoU to explore the joint design and integration of national-security mission capabilities in the UAE.[22] The agreement pairs Space42's sovereign satellite infrastructure, secure AI-enabled communications and beyond-line-of-sight connectivity with Leonardo DRS's C5ISR mission systems. Although focused on UAE requirements, it shows Gulf space capabilities moving into defence alongside Western partners. Through Telespazio and Leonardo DRS, the Leonardo group now works with Emirati space companies on both the civilian and the security side.

Behind these partnerships is a growing domestic industry, which itself relies on European inputs. Space42's Foresight Earth-observation constellation now counts five radar satellites, built with Finland's ICEYE and integrated in Abu Dhabi,[23] and the company has tested direct-to-device satellite messaging on standard smartphones[24], alongside its geospatial analytics and AI services. Orbitworks' Abu Dhabi facility can manufacture up to 50 satellites a year.[25] The UAE is building a domestic value chain that runs from satellite production to connectivity, Earth observation and data services.

Gulf states are also more present where the rules are made. The first International Space Summit in Paris brought together 90 countries and international organisations, around 60 of them at the level of heads of state, government or ministers.[26] The UAE delegation was led by UAE Space Agency Chairman

20. "Space42 and Telespazio Ibérica Begin Wildfire Monitoring in Spain Supported by High Altitude Platform Systems," Space42, Press release, September 2026, 23, https://space42.ai/en/press-release/2026/mira-aerospace-prl/

21. "Firefighting from the sky: UAE firm starts high-altitude monitoring mission in Spain," The National, September 2026, 23, https://www.thenationalnews.com/news/uae/2026/09/23/firefighting-from-the-sky-uae-firm-starts-high-altitude-monitoring-mission-in-spain/

22. "Space42 and Leonardo DRS Sign MoU to Advance Next-Generation National Security Mission Systems," Space42, Press release, August 2026, 12, https://space42.ai/en/press-release/2026/space42-and-leonardo-drs-sign-mou-to-advance-next-generation-national-security-mission-systems/

23. "Space42 Expands Earth Observation Capabilities as Three Foresight Satellites Enter Full Operation," Space42, Press release, June 2026, 9, https://space42.ai/en/press-release/2026/space42-expands-earth-observation-capabilities

24. Ahmed Waqqas Alawlaqi, "No mobile signal? How UAE satellites could keep ordinary phones connected," Khaleej Times, August 2026, 8, https://www.khaleejtimes.com/uae/sms-sos-test-satellite-android-phone-successful

25. "UAE enters space manufacturing era with Orbitworks' sovereign capability," Arab News, November 2025, 12, https://www.arabnews.com/node/2622371

26. "International Space Summit in Paris," Élysée – Présidence de la République, https://www.elysee.fr/en/emmanuel-macron/international-space-summit-in-paris

Ahmad Belhoul Al Falasi,[27] and the UAE, Saudi Arabia and Bahrain were among the 51 countries that signed the summit's declaration on the sustainable use of outer space, together with the European Space Agency.[28] The declaration calls for international coordination, transparency and long-term sustainability. Qatar, Oman and Kuwait did not sign, a reminder that Gulf space policy is far from uniform.

European companies and institutions will remain important sources of technology, engineering and operational experience, and Gulf space programmes will keep relying on foreign partners. What is changing is the balance within those partnerships. As satellites become more closely tied to AI, telecommunications and security systems, Gulf companies are likely to bring more technology, capital and manufacturing to joint projects with Europe, which makes space a useful test of the two-way relationship described in this report.



3. From Riyadh to Europe: The New Saudi–European Entertainment Corridor

Under Vision 2030, Saudi Arabia built entertainment, gaming, tourism, sport and culture as domestic diversification sectors, relying heavily on foreign investment and expertise. Some of the companies and platforms created in the process are now expanding abroad. European expertise still flows into the Kingdom, but Saudi capital, brands and home-grown platforms are starting to move the other way.

France was the main stage this summer. Paris hosted the 2026 Esports World Cup from July 6 to August 23, the first edition of the Saudi-founded tournament held outside the Kingdom.[29] After two editions in Riyadh, the seven-week competition brought more than 2,000 players and 200 clubs from over 100 countries to the French capital, giving Saudi entertainment companies and brands a major European stage.

Qiddiya City used the tournament to market its gaming ambitions to European audiences. As a founding partner of the Esports World Cup, it held naming rights to one of the four competition stages in Paris, the Qiddiya City Grid, and promoted its planned Gaming and Esports District near Riyadh as a future global hub for players, publishers, clubs and fans. The district is designed to cover more than 183,000 square metres, with four esports arenas seating a combined 73,000 people and offices for more than 30 gaming companies. In practice, a platform developed in Saudi Arabia was brought to Europe and used to draw audiences and companies back towards the Kingdom's gaming ecosystem.[30]

27. "Dr. Ahmad Belhoul Al Falasi leads UAE delegation to inaugural International Space Summit in Paris," UAE Space Agency (via Zawya), September 2026, 13, https://www.zawya.com/en/press-release/government-news/dr.-ahmad-belhoul-al-falasi-leads-uae-delegation-to-inaugural-international-space-summit-in-paris-561164

28. "Declaration for a sustainable use of outer space for all," Élysée – Présidence de la République, September 2026, 10, https://www.elysee.fr/emmanuel-macron/2026/09/10/declaration-for-a-sustainable-use-of-outer-space-for-all

29. "Paris to welcome 2,000 players for historic Esports World Cup," Khaleej Times, May 2026, 25, https://www.khaleejtimes.com/sports/paris-to-welcome-2000-players-for-historic-esports-world-cup

30. "Qiddiya City Brings Its Vision for Esports and Gaming to EWC 2026 in Paris," Esports World Cup, July 2026, 6, https://esportsworldcup.com/en/press-releases/qiddiya-city-esports-gaming-vision-ewc-2026-paris

On August 24, the day after the tournament closed, Qiddiya Investment Company and the French government signed a memorandum of understanding to explore an entertainment-led, mixed-use destination at Cergy-Pontoise, northwest of Paris.[31] Current plans envisage around €6 billion of investment over the project's development cycle,[32] with up to three major attractions alongside hotels, leisure, cultural and sporting facilities. According to French President Emmanuel Macron, the project could eventually create around 22,000 jobs. One of the parks is expected to have a manga theme, an idea that goes back to talks between Macron and the Crown Prince in Riyadh in December 2024, and openings would be phased over severalyears.[33]

The project is at an early stage. The MoU starts a process to define its scope, development model and contractual framework, so the €6 billion figure is an ambition, not committed spending. Qiddiya Investment Company, a PIF company,[34] is developing a domestic entertainment, sport and cultural ecosystem around Qiddiya City; the French project would take the experience and partnerships built there to a European site. Qiddiya itself describes the initiative as part of its evolution into a "Saudi national brand" with a growing globalpresence.[35]

For years, European companies have worked on Saudi Arabia's transformation as architects, consultants, hotel operators, cultural institutions, technology suppliers and entertainment partners, and they still do. What Cergy-Pontoise adds is a Saudi company, created under Vision 2030, positioning itself as developer and long-term investor in one of Europe's largest entertainment markets.

The relationship is also becoming institutionalised. During Crown Prince Mohammed bin Salman's August visit to France, the two governments held the first meeting of the French-Saudi Strategic Partnership Council.[36] Their joint statement linked the Qiddiya investment to wider efforts to increase reciprocal investment and cited the Paris Esports World Cup as a basis for further cooperation in culture, youth and sport. Several agreements and MoUs in other sectors were also announced during the visit.

31. "Qiddiya Investment Company Signs MoU with French Government to Explore the Development of an Entertainment Destination in France," Saudi Press Agency (SPA), August 2026, 24, https://www.spa.gov.sa/en/N2660962

32. "Joint Statement by France and Saudi Arabia on the Occasion of the Visit of His Royal Highness Prince Mohammed bin Salman bin Abdulaziz Al Saud, Crown Prince and Prime Minister of the Kingdom of Saudi Arabia, to the French Republic," Élysée – Présidence de la République, Press release, August 2026, 25, https://www.elysee.fr/en/emmanuel-macron/2026/08/25/joint-statement-by-france-and-saudi-arabia-on-the-occasion-of-the-visit-of-his-royal-highness-prince-mohammed-bin-salman-bin-abdulaziz-al-saud-crown-prince-and-prime-minister-of-the-kingdom-of-saudi-arabia-to-the-french-republic

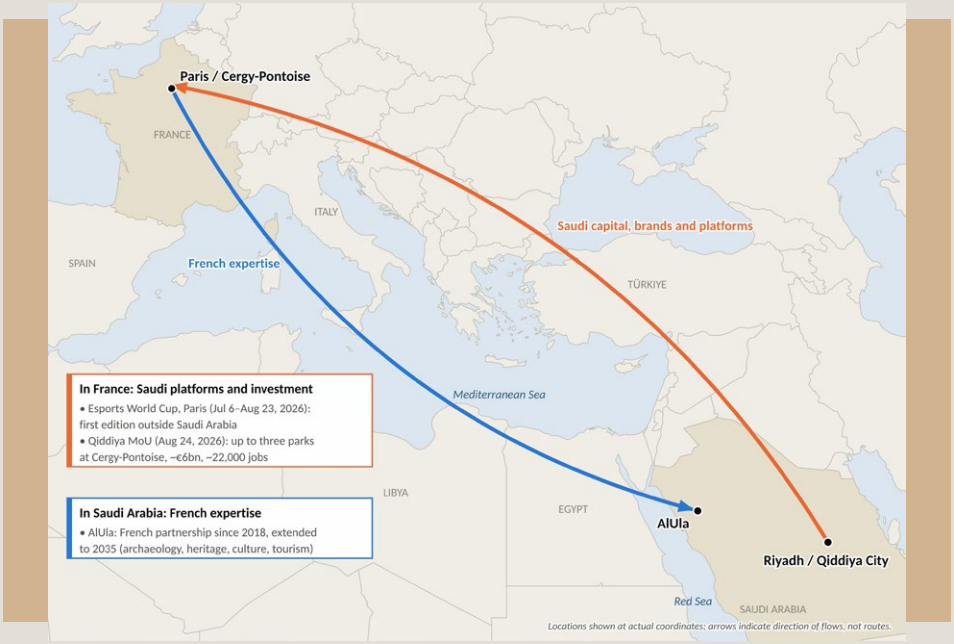
33. Charlotte Blanco Coates, "Saudi Arabia to invest €6bn in three theme parks near Paris, including manga-themed project," Blooloop, August 2026, 25, https://blooloop.com/saudi-arabia-theme-parks-france/

34. "Qiddiya Investment Company," Qiddiya Investment Company, https://qiddiya.com/

35. "QIC Signs MoU with French Government," Qiddiya Investment Company, Press release, August 2026, 24, https://qiddiya.com/media-centre/media-centre-listing/qic-signs-mou-with-french-government/

36. "Riyadh, Paris Agree to Strengthen Cooperation in All Fields," Asharq Al-Awsat, August 2026, 25, https://english.aawsat.com/node/5310790

Figure 3 – The Saudi–French entertainment corridor: flows in both directions



Sources: Author's elaboration based on Khaleej Times, Saudi Press Agency, Élysée – Présidence de la République, Blooloop and French Agency for AlUla Development (AFALULA)

AlUla represents the older direction of the same relationship. In August, France and Saudi Arabia agreed to extend their strategic partnership for AlUla until 2035.[37] Since the first intergovernmental agreement in 2018, French involvement there has grown to cover archaeology, heritage, arts and culture, architecture, tourism, hospitality, mobility and human-capital development.

The two cases run in opposite directions (Figure 3). In AlUla, Saudi Arabia draws on French expertise to build a cultural and tourism destination at home; at Cergy-Pontoise, Qiddiya proposes to take what it has built at home to France. The Esports World Cup sits in between: a Saudi platform that travels abroad while feeding an ecosystem centred on the Kingdom.

None of this makes Saudi Arabia an exporter of entertainment expertise on the scale of established European industries. Many of its largest projects are still under development, their commercial performance has yet to be tested, and Saudi companies continue to depend heavily on international partners. The Cergy-Pontoise project itself still has to go through planning, regulatory approval and implementation.

Still, the direction is clear. Vision 2030 has created companies, events and platforms that are starting to look for opportunities beyond the Kingdom, while European firms keep working on Saudi cultural, tourism and entertainment projects. France is the first European market where this is visible, but others with strong tourism, hospitality, gaming, sport and creative industries, Italy among them, could follow. If Cergy-Pontoise goes ahead and Saudi platforms keep expanding abroad, entertainment could become another sector where Gulf diversification generates investment in both directions.

37. "The French Agency for AlUla Development Welcomes the Strengthening of the Saudi-French Strategic Partnership for the Development of AlUla," French Agency for AlUla Development (Afalula), August 2026, 25, https://www.afalula.com/en/the-french-agency-for-alula-development-welcomes-the-strengthening-of-the-saudi-french-strategic-partnership-for-the-development-of-alula/


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